

Risk Management Specialist- Senior
April 2018

Position Summary:

Under the general direction of the Bureau Director and Property and Liability Manager, the position is responsible for providing professional and technical support in the continuous development and maintenance of the Risk Management Program for the state enterprise. The State Risk Management Program coordinates risk management functions throughout all state agencies, including average annual claims expenditures of \$20 million for workers compensation, \$5.4 million for liability, \$7.0 million for property, and provides education and training statewide to reduce the state's exposure to loss and liability. This position specifically supports the management of the property claims process and supports the state-wide risk control program as well as internal bureau operations. This position requires strong analytical and organizational skills, excellent computer skills, basic knowledge of risk management principles and practices to identify and address unique risks that impact the statewide enterprise. Risks include liability, property, workers compensation and environmental. The activities of this position are directed at remediating and/or mitigating the exposures.

40% A. Provide management for property claims program encompassing approximately 400 claims annually with an annual budget of \$7.0 million.

- A1. Collect, organize, analyze and approve or deny all property claims submitted by state agencies and exercise discretion in resolving claims up to \$1,500; Approve and pay state agency property claims or deny property claims as appropriate; and, participate in reviews and discussions with state agency risk management personnel interpreting policy and procedures as necessary.
- A2. Analyze all property claims over \$1,500 and prepare a recommended course of action for the Bureau's Property and Liability Program Manager; Coordinate all reviews and discussions with the affected agencies; and, Coordinate payments to state agencies and implements resolution.
- A3. Serve as the state's primary contact for property claims; Provide guidance and direction for agencies in urgent, critical and often emergency situations; Filter and assess disparate and complex claim details and information and direct immediate course of action in real-time situations.
- A4. Review submitted agency property claims, including proof of loss reports, accident and police reports, purchase and work orders, receipts, lightning loss affidavits and other documents to determine if the loss is covered; If appropriate assure deductibles are applied and ascertain the actual reimbursable amount of the loss; and, Follow-up as necessary with agency contacts to resolve questions and request additional documentation.
- A5. Refer losses estimated to exceed \$10,000 to the state's property claims adjustment service; Provide claim number and necessary information to initiate investigation; Serve as the state's primary liaison between claims adjuster vendor, state agencies and Property and Liability Program Manager during investigation phase of the claim; Participate in on site visits, direct field visits as necessary, manage the overall claim projects; and, work with state agencies to resolve claims to the best possible outcome.

- A6. Ensure accurate reserving of property claims with Property and Liability Manager; review and modify reserves when appropriate.
- A7. Identify property exposure trends which could impact the statewide enterprise and may necessitate changes in policy, new loss prevention initiatives and/or increased training and education of state risk management personnel.
- A8. Enter appropriate property claim information in the Bureau's Risk Management Information Systems (RMIS) ensuring accurate, timely and consistent statewide claims data.
- A9. Develop ad hoc report writing templates and capabilities for Liability and Property Programs on the RMIS to ensure claims data is available as needed by Director, Property and Liability Program Manager and state agency risk management personnel.
- A10. Perform monthly reconciliation of property portion of the RMIS with Peoplesoft accounting system on all claims paid for a fiscal year.
- A11. Provide Liability Program coverage in the event of absence or vacancy.
- A12. Serve as the primary point of contact for agency owned and non-owned cargo transit shipments which must be reported to the Bureau. Maintain official form and packet for state agency use.

30% B. Provide Bureau Wide Support and insight to Director and Program Managers for Risk Control, Training and Statewide Program Communications.

- B1. Develop risk control and safety on-line training including videos, web casts, power points and any related documents. Perform research and develop materials as directed.
- B2. Develop of seminars and training sessions including development of session materials, handouts, and related documents. Arrange for training facilities and coordinate with trainers to assure facilities are properly prepared on training days.
- B3. Manage training promotion and enrollment and monitor training activities and usage to determine success of promotion.
- B4. Assist in management of an annual risk management conference and provide support for the Director and Program Managers in development of conference sessions.
- B5. Research other risk management websites to determine state of the art risk control and training activities and develop proposals for management consideration.
- B6. Maintain a record of available risk control training documents and work with DOA Document Sales in keeping documents timely and available.
- B7. Coordinate the development of E-newsletter, blanket e-mails for statewide distribution and other communications to assist the bureau and the agencies to promote risk control activities.

- B8. Review, research, edit and rewrite, as necessary, articles submitted to the E-newsletter for accuracy, readability, and consistency with editorial policies. Collaborate with authors to refine and improve articles. Write original articles, and recruit authors for original articles. Interview experts to ensure accurate and update to date information is published.
- B9. Act as editing consultant and author to Director, and Program Managers for program manuals, bureau policies, inter-office and inter-agency memoranda and announcements, and proposed legislation.
- B10. Develop reports as directed from the STARS risk management information system to support risk control activities.

15% C. Provide support for the annual premium setting efforts totaling \$44 million for statewide coverage of Property, Liability (including medical malpractice), and Workers Compensation Programs which underwrite all Bureau administrative and claims functions.

- C1. In conjunction with the Bureau managers, create annual premium budgets for each of approximately 50 state agencies utilizing analytical techniques and evaluation methodologies in all Bureau risk management disciplines; apply principles, practices, analytical approaches and statistical methods when creating and preparing annual premium calculations; Keep abreast of Bureau financial position and subsequent need for premium adjustments; Meet with Director to provide background, assumptions and variances in premium preparations; and, Make final premium adjustments as necessary.
- C2. Collect appropriations and loss experience data from all state agencies for use in determining each agency's premiums for the following fiscal year.
- C3. Prepare RMIS reports to accurately compile and collect loss experience data for past fiscal years for various property and liability loss categories for all state agencies and sub-agencies, including University campuses, for use in individual agency premium calculations for Property, Liability (including medical malpractice) and Workers Compensation.
- C4. Review all loss experience data and cap property and liability experience and reserves for payments made on claims across fiscal years.
- C5. Conduct annual premium calculation process. This includes study and analysis of lengthy methodology papers, meeting minutes and notes, Excel spreadsheets and other documentation of accepted practices of the development and computation of annual premiums, billed to all state agencies and institutions, boards and offices including the University of Wisconsin System.
- C6. Develop surveys and forms to acquire supporting documentation from agencies and institutions statewide necessary to prepare annual premiums, including property valuations, annual GPR and non-GPR operating budgets and statewide employee allocations according to different risk categories.
- C7. Utilize complex, inter-related spreadsheets necessary to generate annual premiums for Liability, medical malpractice, Property and Workers Compensation Programs.

- C8. Prepare premium data reports. Review premium data and calculations with program managers. Analyze data to identify trends and causes for increases in agency premiums.
- C9. Respond to requests pertaining to premium calculations, amounts and concepts from agencies using language understandable to a variety of audiences; Interpret and explain data as necessary for state agencies.
- C10. Serve as a liaison to agencies with respect to premium issues, including questions as to methodologies and premium computations, basis for experience ratings, data verification, invoices and other issues and concerns.
- C11. Generate annual invoices for Liability, Property and Workers Compensation premiums for all state agencies and institutions, boards, offices and the University of Wisconsin System.

10% D. Serve as the Bureau's Web Page content manager to promote greater risk management awareness and improve state agency communications.

- D1. Revise, update and maintain Bureau main web page for program areas to provide agencies with immediate access to materials and resources necessary and appropriate for risk management operations, policies and practices.
- D2. In a timely manner upload all new or newly revised materials and links for Bureau functions including web casts, PowerPoint presentations, industry and state web-based forms and guidelines, policy and program information.
- D3. Periodically review all web page documents and remove outdated or inappropriate materials and refresh home page to make sure information is new and interesting.
- D4. Develop and maintain external links to appropriate resources and images to support Bureau initiatives and statewide risk management principles.
- D5. Review other state web pages and industry web pages to determine state of the art materials or methods of promotion used and develop proposals for management to consider in enhancing effectiveness of website. Contact web page owners when appropriate to obtain permission to use their materials.

5% E. Provide comprehensive support to Director, and Program Managers in the development and maintenance of the State Risk Management Program and the Overall Bureau Operations.

- E1. Collaborate with Director and Program Managers and DOA budget staff in the preparation of the Bureau of State Risk Management's annual operating budget.
- E2. Compile and gather information from Stars reports for monthly report detailing all claims costs for the property, liability, medical malpractice and worker's compensation programs monthly and year-to-date and as compared against last year's figures.

- E3. Compile data and develop a monthly claim count report for workers compensation claims.
- E4. Act as liaison to Division of State Facilities with building management work orders.
- E5. Act as point person for 5th floor copier needs with DOA's Administrative Services Bureau.
- E6. Monitor the procurement of all Bureau office supplies and provide problem resolution assistance within the Bureau.
- E7. Prepare required purchase orders and facilitate payment of bureau vendor invoices through the States payment/vendor management system.
- E8. Perform other projects and assignments as directed by the Director.

Knowledge, Skills, and Abilities:

- 1. Basic knowledge of risk management principles and practices to identify and address unique risks that impact the statewide enterprise.
- 2. Ability to draft reports and other documents and to interpret Department, Division, and Bureau policies, procedures and rules.
- 3. Knowledge of planning and program evaluation principles, theories and procedures, and an ability to apply them in organization and analysis of complex problems.
- 4. Knowledge of investigative approaches.
- 5. Knowledge of reporting measurements and methodologies.
- 6. Organizational skills, including demonstrated ability to work independently and coordinate work efforts with fellow staff members.
- 7. Strong communications and interpersonal skills.
- 8. Analytical skills.
- 9. Knowledge of basic computer skills to prepare reports and spreadsheets (Microsoft Word, Excel, Power Point).